

Instructional Designers' Field Guide: Mini Toolkit

A free planning starter set for early-career instructional designers



EARNING OBJECTIVES





WORKSHEET



USE THIS WORKSHEET TO DEFINE CLEAR, MEASURABLE LEARNING OBJECTIVES THAT WILL GUIDE YOUR COURSE DESIGN. FILL IN EACH SECTION TO ENSURE YOUR OBJECTIVES ARE SPECIFIC, ACTIONABLE, AND ALIGNED WITH YOUR PROJECT'S GOALS.



Section 1: Audience & Context





Section 2: Goal Statement

OVERALL PURPOSE OF THE COURSE OR TRAINING:



Section 3: SMART Objectives

For each learning objective, follow these prompts to make it SMART (Specific, Measurable, Achievable, Relevant, Time-bound) and effective. Use the following formula:



WHAT WILL THEY DO?

Action Verb + Content/Skill + WHAT WILL THEY LEARN?

Measurement +

HOW WILL YOU KNOW WHAT THEY DID IT?

Conditions

UNDER WHAT **CIRCUMSTANCES?** Deadline **TIMEFRAME**







Objective #1

VERB: SKILL: _____ MEASUREMENT: CONDITION: TIMEFRAME: _____

Objective #2

VERB: Skill: _____ MEASUREMENT: CONDITION: TIMEFRAME: _____



Objective #3

VERB: _____ Skill: _____ MEASUREMENT: CONDITION:

Objective #4

VERB: _____ Skill: _____

MEASUREMENT: CONDITION:

TIMEFRAME: _____



Review: Alignment Self-Check

TIMEFRAME: _____

REVIEW YOUR OBJECTIVES. ARE THEY SMART AND CLEARLY ALIGNED WITH YOUR COURSE GOALS?







LEARNING OBJECTIVES

INSTRUCTIONS

<u>Purpose</u>: This worksheet helps you craft SMART learning objectives that align with instructional goals, course design, and learner needs. Use it as a strategic tool across design projects, curriculum proposals, or eLearning development cycles.

<u>How to Use This Worksheet</u>: Use each section to reflect on the "who, what, how, and when" of learning in your course or training experience.

- Section 1: Audience & Context
 - O DEFINE LEARNER CHARACTERISTICS AND THE LEARNING ENVIRONMENT.
- SECTION 2: GOAL STATEMENT
 - · ARTICULATE THE OVERARCHING INSTRUCTIONAL GOAL OF THE COURSE OR MODULE.
- SECTION 3: SMART OBJECTIVES
 - Use the structured prompts to write Specific, Measurable, Achievable, Relevant, and Time-bound objectives. Include a strong action verb, a skill, measurable outcome, condition, and timeframe.
- SECTION 4: ALIGNMENT SELF-CHECK
 - CONFIRM THAT EACH OBJECTIVE SUPPORTS YOUR STATED GOAL AND CAN BE ALIGNED TO ASSESSMENTS AND ACTIVITIES.

Alignment Tips

- ALIGN OBJECTIVES WITH MODULE OUTCOMES, CONTENT, AND FORMATIVE OR SUMMATIVE ASSESSMENTS.
- ENSURE OBJECTIVES REFLECT APPROPRIATE COGNITIVE LEVELS FOR THE LEARNER POPULATION.
- USE OBJECTIVES TO JUSTIFY INSTRUCTIONAL STRATEGIES, TECH TOOLS, AND COURSE ACTIVITIES.
- ALIGN TO PROGRAM OUTCOMES OR ACCREDITATION STANDARDS WHERE APPLICABLE.

1	Ble	Bloom's Taxonomy: Sample Action Verbs			
И	Level	Cognitive Skill	Example Verbs		
u	1	Remember	define, list, identify, recall,		
H	2	Understand	name explain, summarize, describe, classify		
	3	Apply	use, implement, calculate, demonstrate		
A	4	Analyze	compare, contrast, examine, differentiate		
	5	Evaluate	judge, justify, assess, critique		
	6	Create	design, construct, formulate,		
H			develop		
27					

Pro Tip: Match verbs to assessment types. For example, "design" pairs well with project-based tasks, while "identify" fits knowledge checks.

Notes for Advanced Use:

- FOR COMPETENCY-BASED OR MICROCREDENTIAL DESIGN, MAP EACH OBJECTIVE TO A DEMONSTRABLE SKILL AND CLEAR CRITERIA.
- CONSIDER ACCESSIBILITY: ENSURE LEARNING OBJECTIVES CAN BE DEMONSTRATED IN MULTIPLE FORMATS (E.G., WRITTEN, AUDIO, VISUAL).
- USE WITH BACKWARD DESIGN, ADDIE, OR DESIGN THINKING WORKFLOWS.

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	A free planning starter set for early-career instructional designers	Title of your storyboard		
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	PRO TIP: WRITE YOUR NARRATION AS IF YOU INTERACTIVE ELEMENTS OR BRANCHING PATH	D ARE SPEAKING DIRECTLY TO YOUR AUDIENCE. READ IT ALC IS FOR CLARITY. E-LEARNING COURSES, CREATE YOUR LEAR WWW.IDFieldGuide.com	DUD TO CATCH AWKWARD WORDING. COLOR-CODE ANY RNING OBJECTIVES BEFORE YOUR STORYBOARD!	

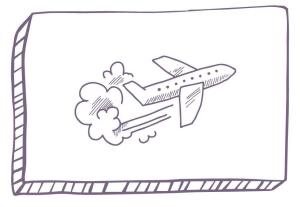
BACKSIDE - PRINTNG OPTIONAL

TITLE OF YOUR STORYBOARD

This storyboard helps you visualize how your content will flow before development. Each panel represents one scene or screen in your course, video, or animation.







2 Design storyb

Designers have used storyboard to design scenes for television, or movies.

How to Use This **Storyboard**

THIS STORYBOARD IS YOUR VISUAL PLANNING SPACE — A WAY TO SEE YOUR PROJECT BEFORE YOU BUILD IT. EACH PANEL IS ONE SCENE OR SCREEN, SO START BY GIVING YOUR STORYBOARD A TITLE THAT MAKES IT EASY TO RECOGNIZE LATER.

In each panel, sketch or describe the visuals you want, jot down the exact text that will appear on screen, and write the narration or audio that will go with it. If there's any interaction — like a button to click, a branching choice, or an animation — note it clearly. Use the notes area to capture timing, technical details, or reminders for yourself and your team.

KEEP EACH PANEL FOCUSED ON ONE MAIN IDEA SO YOUR FLOW STAYS CLEAR. YOU DON'T NEED TO BE AN ARTIST — QUICK SKETCHES OR SIMPLE SHAPES WORK JUST FINE. IF YOU'RE PLANNING BRANCHING PATHS OR INTERACTIVE MOMENTS, TRY COLOR—CODING THEM SO THEY'RE EASY TO SPOT. AND BEFORE YOU FINALIZE, READ THE NARRATION OUT LOUD TO MAKE SURE IT SOUNDS NATURAL AND FITS THE PACE OF YOUR PROJECT.

Need a spark?

If you're stuck on how to fill a panel, start by picturing the moment you want the learner to experience — is it a quick "aha!" moment, a step—by—step demo, or a challenge to solve? You can also grab ideas from everyday life: movie scenes, comic strips, product ads, or even social media posts. Look at how they combine images, text, and pacing — then borrow what works.

Don't be afraid to storyboard loosely at first. Messy sketches are fine — you can refine later. The goal is to get ideas flowing, not to make perfect art from the start, and you can print out as many copies of your storyboard as you need!

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PROJECT BRIEF

PROJECT NAME & CONTACT:

PROJECT DUE DATE :

PROJECT OVERVIEW

DIMENSION REQUIREMENTS:

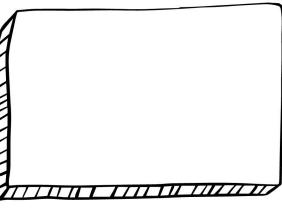
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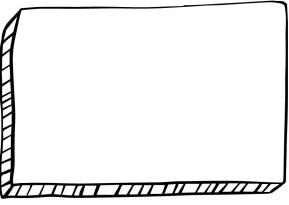
FILE FORMAT:

ACCESSIBILITY NEEDS:

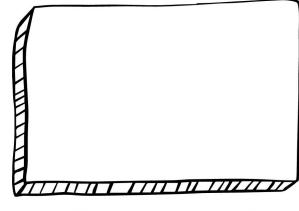
DELIVERABLES



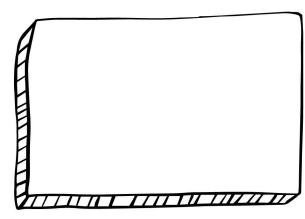
KEY STAKEHOLDERS



OBJECTIVES



SUCCESS CRITERIA











BACKSIDE - PRINTNG OPTIONAL

PROJECT BRIEF

INSTRUCTIONS

THESE GUIDELINES ARE GENERAL BEST PRACTICES FOR CREATING PROFESSIONAL, EFFECTIVE INSTRUCTIONAL DESIGN PROJECTS. THEY ARE NOT A SUBSTITUTE FOR UNDERSTANDING YOUR CLIENT'S SPECIFIC NEEDS — ALWAYS START BY RESEARCHING THE PROJECT CONTEXT, REVIEWING THE CLIENT'S BRAND GUIDELINES, AND CONFIRMING ALL TECHNICAL REQUIREMENTS BEFORE YOU BEGIN DESIGNING.

PLATFORM DIMENSIONS:

SELECT DIMENSIONS BASED ON THE PLATFORM WHERE YOUR PROJECT WILL BE DELIVERED: LMS SLIDE DECKS: USE A 16:9 RATIO (1920×1080 PX) — THE STANDARD FOR MOST ELEARNING AND PRESENTATION SLIDES.

MOBILE LEARNING: USE A VERTICAL 9:16 RATIO (1080×1920 PX) — ENSURES CONTENT DISPLAYS WELL ON PHONES.

VIDEO CONTENT: USE 16:9 (1920×1080 px) FOR STANDARD HD, OR 4K FOR HIGH-QUALITY PRODUCTIONS.

TIP: CONFIRM DIMENSION REQUIREMENTS WITH THE CLIENT BEFORE DESIGNING - RESIZING LATER CAN DISTORT LAYOUTS.

BRANDING & STYLE GUIDE:

FOLLOW THE CLIENT'S BRAND GUIDELINES TO ENSURE CONSISTENCY AND RECOGNITION:

Fonts: Limit to 2 — one for headings, one for body text, to keep designs clean.

COLORS: USE THE BRAND'S OFFICIAL PALETTE AND CHECK CONTRAST RATIOS TO MEET WCAG ACCESSIBILITY STANDARDS.

LOGOS: PLACE CONSISTENTLY (OFTEN BOTTOM-RIGHT OR TOP-LEFT). AVOID COVERING TEXT OR KEY VISUALS.

ICONS: USE A UNIFIED STYLE SET (FLAT, OUTLINE, ETC.) SO VISUALS FEEL COHESIVE.

ACCESSIBILITY NEEDS:

DESIGN WITH ALL LEARNERS IN MIND:

ENSURE HIGH CONTRAST BETWEEN TEXT AND BACKGROUND.

PROVIDE ALT TEXT FOR ALL VISUALS.

INCLUDE CAPTIONS/TRANSCRIPTS FOR AUDIO AND VIDEO.

AVOID USING COLOR ALONE TO INDICATE MEANING - PAIR IT WITH ICONS OR LABELS

FILE FORMATS:

CHOOSE EDITABLE FORMATS FOR COLLABORATION AND FINAL FORMATS FOR DELIVERY:

EDITABLE: GOOGLE SLIDES, POWERPOINT, CANVA (FOR CLIENT REVISIONS).

FINAL DELIVERY: PDF (STATIC), PNG (IMAGES), MP4 (VIDEOS).

TIP: SAVE A MASTER EDITABLE COPY FOR FUTURE UPDATES.

SUGGESTED TOOLS:

PICK THE RIGHT TOOL FOR YOUR WORKFLOW:

CANVA: FAST DESIGN + EASY EXPORT FOR STATIC OR LIGHTWEIGHT ANIMATED CONTENT.

GOOGLE SLIDES: IDEAL FOR REAL-TIME COLLABORATION.

POWERPOINT: BEST FOR ADVANCED LAYOUTS AND ANIMATIONS.

